

REQUEST FOR PROPOSALS – CUSTODIAL/MASTER TRUST SERVICES

BACKGROUND

The Arlington Retirement System (“System”) is governed by the Arlington Retirement Board (“Board”) and is the pension system serving the Town of Arlington and the Arlington Housing Authority in Middlesex County, Massachusetts. The Board manages approximately \$160 million in assets and employs a staff of two people in its office located in Arlington, Massachusetts. As of December 31, 2018, the System had 735 active participants, 331 inactive participants and 601 retired participants and beneficiaries within the retirement system. The Board and System are governed by Chapter 32 of Massachusetts General Laws and is a member of the Massachusetts Contributory Retirement System. The Board is subject to the oversight of the Public Employee Retirement Administration Commission (“PERAC”).

INSTRUCTIONS TO PROPOSERS

Designated Contact: Prior to receiving a copy of this Request for Proposals (here in after “RFP”), a Proposer must provide to the Board’s designated contact the following information:

Name

Address

Phone Number

Fax Number

Email Address

The person listed above will be the designated contact for the Proposer. All correspondence from the Board will be to the designated contact of the Proposer. The Board will endeavor to submit all responses via email. However, the Board reserves the right to submit correspondence relative to this RFP in any manner it deems appropriate. No person shall receive a copy of this RFP without first registering by providing a designated contact with the information required in this RFP. No proposal will be considered from any person who has not registered in the manner required by this RFP.

Receiving Copies of the RFP: In order to receive a copy of this RFP you must contact:

Richard Greco, Retirement Administrator

Arlington Retirement Board

27 Maple Street Suite G-11

Arlington, MA 02476

781-316-3370 (Tel)

781-316-3379 (Fax)

rgreco@town.arlington.ma.us

Proposal deadline is Wednesday, December 4, 2019 at 4:00 PM EDT. Late proposals will not be accepted.